State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

CHRISTINE TODD WHITMAN
Governor

JANE M. KENNY
Commissioner

WEATHERIZATION BULLETIN #718

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Recommended client education strategies for recipients of heating system improvement services

Reference: None

Summary: OLIEC recommends that field technicians develop and implement a program of client education. This program should emphasize preventive maintenance procedures, general understanding of efficiency testing, and how to request services from contractors. In addition, OLIEC suggests that agencies develop a sticker on which to record efficiency test data.

To ensure that the clients have a basic understanding of the maintenance required to keep their heating systems operating at optimal efficiency, the Office of Low-Income Energy Conservation recommends the incorporation of a client education component into all weatherization programs (when applicable).

The agency field technician should provide the client with the following information at a "post-installation" orientation session:

1. Show the client when and how to change the oil filter.
2. Explain to the client what heating system efficiency is and how to request an efficiency test in writing.

(continued)

3. Explain the detrimental effects of running out of oil, (i.e.: voiding the service warranty by clogging the system with sediment and sludge).

4. Review the periodic maintenance procedures with are the responsibility of the dwelling occupant, with particular emphasis on the operations of steam systems.

5. Ascertain that the contractor has left the instruction booklet (replacement units) with the client.

6. Review with the client the proper procedure for requesting service from the contractor and/or the manufacturer.

7. Leave a completed and signed copy of a mechanical data collection and recommendation form with the client once <u>all</u> work is done. (Copy of form attached with this bulletin.)

Each agency should also develop a sticker to be attached to the unit for recording the date(s) the unit was serviced. The sticker should have enough space to allow for multiple entries and be attached to the heater is a conspicuous place. The sticker should include information on carbon dioxide, oxygen, carbon monoxide, smoke, and steady state efficiency. The test date and identity of the person performing the test should also be included.

CSS/bam/1900R

NEW JERSEY WEATHERIZATION ASSISTANCE PROGRAM

APPLIANCE/HEATING SYSTEM EVALUATION

Tenant/Landlord/Home Owner: _____

Job Order Number: _____

Address: _____

City: _____

Agency Name: _____ Phone #: _____

Agency Contact Person: _____

1. DRYER ☐ Gas ☐ Electric

A. If Dryer is Gas, has a Carbon Monoxide test and a check for gas leaks been completed?
☐ Yes ☐ No

B. Ambient Air Reading _____ PPM

C. Carbon Monoxide _____ PPM

D. If you have located a gas leak on the dryer, have you informed the client and notified the local utility company? ☐ Yes ☐ No

If yes, give the name of company and person contacted?

_____

_____

E. Is the unit properly vented? ☐ Yes ☐ No

F. Does the owner remove lint from the filter before each use? ☐ Yes ☐ No

2. STOVE

A. Has a carbon monoxide test and a check for gas leaks been completed?

☐ Yes ☐ No

If no, explain _____

B. Carbon Monoxide Reading:

_____ PPM

C. Ambient Air Reading _____ PPM

D. If you have located a gas leak on the stove, have you informed the client and notified their local utility company? ☐ Yes ☐ No

E. If yes, give the name of the company and the person contacted?

_____

_____

3. FURNACE, BOILER, SPACE HEATER, or HOT WATER HEATER

A. Carbon Monoxide Reading on unit. (From Final Inspection)

Heater _____ PPM Hot Water Heater _____ PPM

B. Has a new unit been installed? ☐ Yes ☐ No Date Installed _____

C. What type?

	Model #	Manufacturer
☐ Furnace	_____	_____
☐ Boiler	_____	_____
☐ Space Heater	_____	_____
☐ Hot Water Tank	_____	_____

D. Has owner received the manual and warranty information on the unit installed?

☐ Yes ☐ No

E. The weatherization contractor should be contacted if there is a problem during the first year.

Contractor Name: _____ Phone #: _____

The manufacturer of the unit should be contacted if equipment is older than one year.

Manufacturer Name: _____ Phone #: _____

Local Distributor _____

Phone #: _____

4. REQUIRED HEATING SYSTEM/HOT WATER TANK MAINTENANCE

- ☐ Change filter as needed (Warm Air Unit)
- ☐ Flush Low Water Cut-Off Weekly (Boiler) - During Heating Season
- ☐ Vacuum Base Board Heat Elements
- ☐ Flush Hot Water Tank (Annually)

Malfunction of Oil-fired Heating Systems due to fuel run-outs are <u>not</u> covered by warranty.

Additional Comments: _____

_____

_____

_____

APPLICANT CERTIFICATION STATEMENT:

I HEREBY CERTIFY THAT I HAVE RECEIVED A COPY, READ AND UNDERSTAND ALL OF THE ABOVE INFORMATION.

Signature of Applicant: _____

Date: _____

_____ _____

Date Interviewer

State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

CHRISTINE TODD WHITMAN
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WEATHERIZATION BULLETIN #719

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Pre-installation inspections of heating systems.

Summary: All heating systems proposed for improvement services must be inspected by the agency Heating System Specialist prior to the agency soliciting any work proposals from contractors. The objective of this inspection procedure is to ascertain if there are circumstances present at the work site of which the contractor should be aware before he/she prepares the work proposal. Contractors' proposals must be sufficiently comprehensive so as to provide the client with a safe, effective, and efficient heating system which compiles with all applicable codes and regulations.

Agencies must stress to contractors that estimates for heater replacements should include <u>all additional parts</u> needed to guarantee that the unit will operate at the minimum efficiency of 80%". In addition to this efficiency requirement, is also required that, clients be left with heating systems which operate safety and effectively, as well as efficiently, at the conclusion of a repair retrofit, or replacement job.

Individual circumstances may dictate that to achieve this goal, improvements or corrections to the venting, distribution, water supply, or power supply systems (for example) may be required.

All heating systems proposed for improvement services (whether retrofit, repair, or replacement) must be inspected by the agency field technician prior to the agency soliciting any work proposals from contractors. This pre-installation inspection requirement applies to all heating system work, including the replacement of non-functional systems being serviced on an emergency basis.

The objective of this inspection procedure is to ascertain if there are circumstances present at the work site of which the contractor should be aware before she/he prepares the work proposal. The results of this agency pre-inspection may indicate to the contractor that a site visit is necessary to gather additional information before the work proposal is prepared.

When contractors are solicited for proposals, they should be informed of any agency observations concerning circumstances at the premises which could either impact the ability of the contractor to complete the job, or the ability of the heater to function safety, effectively, and efficiently following installation. These agency observations of potential secondary problems need not necessarily be conclusive, if the circumstances observed are beyond the technical expertise of the agency field technician to diagnose. Contractors should include the correction of these secondary problems in their proposals, whenever correction is necessary.

Heating system contractors may rely on appropriate subcontractors for secondary problem correction. As an alternative, agencies may contract with appropriate tradespeople for the correction of secondary problems before authorizing contractors to proceed with heating improvement services. Contractors' proposals must include all costs, including any costs incurred through subcontractors, in their proposals. Contractors' proposals must be sufficiently comprehensive so as to provide the client with a safe, effective, and efficient heating system which compiles with all applicable codes and regulations.

CSS/bam/1901R

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WEATHERIZATION BULLETIN #720

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Efficiency rating of horizontal warm air furnaces

Summary: OLIEC is amending the standard applicable to horizontal warm air furnaces. The new standard is a minimum Steady State Efficiency of at least 78%.

Existing OLIEC standards for replacement heating systems require that these systems have a Steady State Efficiency rating of at least 80%. These ratings are verified before heating systems are approved for installation by checking with the directories of independent trade associations, such as the Gas Appliance Manufacturers' Association (GAMA). The Steady State Efficiency is verified after installation through combustion efficiency test conducted by the installing contractor and the agency field technician.

Due to recent changes in the certification process used by GAMA to rate the efficiency of heating systems, it may be difficult to select a horizontal warm air furnace with a Steady State Efficiency which meets New Jersey's 80% requirement.

Therefore, OLIEC is amending the standard applicable to horizontal warm air furnaces. The new standard is a minimum Steady State Efficiency of at least of 78%.

This amended standard is only applicable to horizontal warm air furnaces. Use of heating units which cannot meet the 80% Steady State Efficiency standard should be avoided whenever possible. The OLIEC will only approve the use of such units when there is no reasonable alternative which meets the 80% Steady State Efficiency requirement.

Whenever horizontal warm air furnaces which do not meet the 80% Steady State Efficiency are installed, the installation should include either a vent damper or a power vent, depending on whether the unit is oil or gas-fired.

CSS/bam/1903R

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WEATHERIZATION BULLETIN #721

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Agency maintenance of heating contractors' documentation.

Reference: Bulletin #202

Summary: Agencies may maintain a separate file for heating contractors' documentation. This documentation is not required in each client/facility file.

Effective immediately, it is not mandatory to have a copy of the contractors' assurances form or certificates of insurance in each individual client or facility file.

Agencies are permitted to maintain a separate master file for originals of these documents, which are to be available on demand for inspection by the State monitoring staff.

Agencies have the discretion to only require contractors to sign the assurances form once to cover all furnace and boiler replacements.

Although the contractors' insurance certificates may be kept in a separate file, agencies are reminded that these documents must be renewed annually for the contractor to remain in active status.

Although individual client/facility files need not contain the contractor administrative documentation, agencies should be aware that it remains their responsibility to have in their possession original and properly executed, currently effective, contractors' assurances forms and certificates of insurance for each contractor assigned heating system work.

CSS/bam/1905R

State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

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WEATHERIZATION BULLETIN #722

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Efficiency standard for replacement furnaces installed in mobile homes

Reference: None

Summary: The efficiency standard for new oil-fired furnaces installed in mobile homes is revised. The new standard is a minimum 78% Steady State Efficiency, a minimum of 10.5% Carbon Dioxide, zero to trace smoke, and a maximum Carbon monoxide reading of 100 ppm in the flue and a maximum Carbon monoxide of 09 ppm in the ambient air. All four standards must be achieved and vertified for the unit to pass inspection.

Many mobile homes in New Jersey are equipped with oil-fired furnaces.

These furnaces are designed specifically for limited-space installation and use exterior air for combustion. The replacement units often fail to achieve the 80% Steady State Efficiency requirement by one or two percentage points, due to an elevated stack temperature.

To facilitate the provision of heating improvement services to the occupants of mobile homes, the efficiency standard for mobile home replacement oil-fired warm air furnaces is revised by this Bulletin. The new standard is a minimum 78% Steady State Efficiency, a minimum of 10.5% Carbon Dioxide, zero to trace smoke, and a maximum carbon monoxide reading of 100 ppm in the flue, and maximum carbon monixide reading of 9 ppm in the ambient air. All four standards must be achieved and verified for the unit to pass inspection.

It has been suggested by the Institute for Human Development (IHD) that contractors derate the unit to a 0.65gph nozzle (or less) whenever possible in order to minimize the stack temperature and maximize the efficiency (provided that this strategy does not affect the manufacturer's warranty).

This Bulletin constitutes a blanket waiver of the 80% Steady State Efficiency requirement for replacement oil-fired furnaces installed in mobile homes. However, the unit must achieve the revised standard listed above unless manufacturer indicates testing of replacement furnace will void warranty.

CSS/bam/1906R

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DEPARTMENT OF COMMUNITY AFFAIRS

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WEATHERIZATION BULLETIN #723

October 2, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Completed unit reporting of heating system Improvement Services provided to multi-family buildings.

Summary: The material and installation labor costs of heating system improvement services in multi-family buildings are prorated across all the building's dwelling units which are reported on the Completed Units Report. If at least 50/66% (as appropriate) of the dwelling units are eligible, then all of the dwelling units (including the eligible, ineligible and vacant) should appear on the Completed Units Report. If less than 50/66% of the building's dwelling units are eligible, then only the eligible units are reported. In all cases, intake must be completed on the entire building to establish the eligibility status of each dwelling unit.

Weatherization Bulletin #301, discusses the 50/66% rule and how it impacts both the actual shell weatherization strategies applied to multi-family buildings and the reporting of the weatherized building's dwelling units on the Completed Units Report. The intent of this Bulletin is to extend this discussion to include the reporting of heating system improvement services in multi-family buildings.

The 50/66% rule refers to the ratio of eligible to total dwelling units in a building. This ratio determines if shell weatherization tactics must be limited to the eligible dwelling units only, or if shell tactics can be applied to the ineligible units and common areas as well. For those buildings containing two (2) through four (4) dwelling units, at least 50% of the dwelling units must be eligible to qualify the remainder of the building for direct shell weatherization services. For those buildings which contain more than four (4) dwelling units, at least 66% of the units must be eligible.

Whether a building meets the 50/66% threshold or not, eligible dwelling units are always qualified for direct shell weatherization services. Similarly, eligible dwelling units are also qualified for heating system improvement services. This qualification applies regardless of the eligibility status of the other dwelling units in the building; and also regardless of the fact that these other dwelling units may be secondary beneficiaries of the heating system improvement services applied for the primary benefit of the eligible units.

The 50/66% rule also affects how heating system improvement services are reported on the Completed Units Report. The material and installation labor costs of heating system improvement services in multi-family buildings are prorated across all the building's dwelling units which are on the Completed Units Report. If at least 50/66% (as appropriate) of the dwelling units are eligible, then all of the dwelling units (including the eligible, ineligible and vacant) should appear on the Completed Units Report. If less than 50/66% of the building's dwelling units are eligible, then only the eligible units are reported. In all cases, intake must be completed on the entire building to establish the eligibility status of each dwelling unit.

Shell weatherization and heating system improvement services conform to the same rules and procedures concerning eligibility and reporting matters. Eligible dwelling units are qualified for both types of service, without consideration of the eligibility status of other units in the building. If less than 50/66% of the building's dwelling units are eligible, then only the eligible dwelling units receiving service are listed on the Completed Units Report. If at least 50/66% of the building's dwelling units are eligible, then all the units in the building are listed on the Completed Units Report. Common areas are only reported when they are the direct recipient of weatherization services. Therefore, common areas may (or may not) be listed on the Completed Units Report.

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WEATHERIZATION BULLETIN #724

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: DOE, DHS, HIP

Topic: Contractors' Assurances Form

Reference:
(1) Weatherization Bulletin #718
(2) Weatherization Bulletin #721
(3) Weatherization Bulletin #202

Revision Scope: Revises minimum amount of insurance required for heating system installations.

Transmits a revised Contractors' Assurances Form to be completed by contractors providing heating system improvement services, other than oil burner retrofits.

CSS/bam/1914R

STATE OF NEW JERSEY

HEATING SYSTEM IMPROVEMENT PROGRAM

DEALER/SERVICE CONTRACTOR ASSURANCES

Company Name & Address:

.....

In connection with the performance of work under the Heating System Improvement Program, the above-cited Dealer/Service Company (hereinafter referred to as the Contractor) assures the State of New Jersey that he/she shall:

1. Provide only those program services specifically authorized by the program, unless he/she first receives permission from the Local Government/Community Action Agency to delete and/or add additional services.

2. Professionally complete all authorized services within one week following the receipt of the letter of authorization.

3. Achieve and submit to the agency in writing the following minimum performance standards:

   a. If an oil-fired unit, a steady-state efficiency of 80% percent or more, a reading of 1 or less on the bacharch smoke scale, a minimum carbon dioxide reading of 10.5 percent, and a carbon monoxide reading of no greater than 100 ppm in the flue.

   b If a gas-fired unit, a rating in the Gas Appliance Manufacturers Association Consumer Directory of Certified Efficiency Ratings of no less than 77.5% AFUE, and a post installation test standard of no greater than 9% O2, and a carbon monoxide reading of no greater than 100 ppm in the flue.

   Gas units that require a higher oxygen reading, per the manufacturer's instructions, are acceptable but must be documented in the form of a letter from the manufacturer and/or the installation specifications.

4. Hold harmless the State of New Jersey and the Local Government/Community Action Agency with respect to any damages or liabilities arising from any conduct performed by the Contractor or his/her staff. In the event that any litigation arises due to the conduct of the Contractor, the Contractor shall hold harmless the State of New Jersey and the Local Government/Community Action Agency pursuant to these program assurances. The Contractor shall maintain insurance to sufficiently cover any and all damages that may result from the Contractor's participation in this program, including General Liability Insurance (with completed Operation coverage) in an amount not less than $500,000, each occurrence of bodily injury and $500,000 for each occurrence of property damage, and shall ensure that the State of New Jersey and its officers, employees and agencies are named as insured parties under any such insurance policy. Workmens' compensation coverage is also required, unless the contractor is the sole proprietor in which case, self protection coverage is sufficient. A certificate of said insurance coverage shall be provided by the Contractor to the agency prior to initiation of services for the Heating System Replacement Program.

5. Acquire any and all necessary permits and submit a copy to the agency before proceeding with any authorized service. Insure that the completed installation complies with all applicable laws, ordinances, and codes of the local, state, and federal governments, and is in compliance with safety standards of local code authorities and/or public utilities.

6. Agree to meet minimum performance standards as outlined in 3a. and b, before requesting payment for a heating system installation.

7. Agree to service his/her workmanship and materials free of charge for a period of one (1) year after the installation of such materials (one year parts and labor warranty). Shall follow-up on any complaints associated with Heating System Replacement services provided for the Program within (5) calendar days except when the complaint is of no-heat, which shall be followed-up within 24 hours of notification.

The contractor hereby certifies that the statements made in these assurances shall be complied with and that the person whose signature appears below is the authorized representative of the Contractor.

_____
Name & Title of Responsible Officer

Date:_____

_____
Signature of Responsible Officer

State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

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WEATHERIZATION BULLETIN #725

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor
Office of Low-Income Energy Conservation

Affected Programs: All

Topic: Heating System Improvement Program Checklist
Heating System Improvement Program Survey Report

Reference: (1) none

Revision Scope: Makes minor editorial changes to the heating System Improvement Program Checklist and the Survey Report.

Summary: See Bulletin text below.

Attached to this Bulletin is a revised Heating System Improvement Program Checklist and Survey Report. The Checklist now includes information that was previously noted on the HIP Survey and the hot water heater attachment. These forms are no longer required. The Survey Report has been revised to be applicable to all types of heaters, regardless of fuel type. The Survey report replaces the Oil Retrofit Survey form, which will no longer be used.

Heater evaluations are mandatory for every unit weatherized. Each client file should contain a copy of the Heater Survey form documenting the condition of the heater. The Checklist must be completed in full and maintained on file whenever heating system improvement services are provided.

CSS/bam/1917R

NJ WEATHERIZATION ASSISTANCE PROGRAM
HEATING SYSTEM IMPROVEMENT PROGRAM
SURVEY REPORT

Agency Name_____

Client Name_____Job #_____

1. Client Authorization

I authorize representatives of _____(agency) to enter my home to complete necessary testing and evaluation on my furnace as prescribed on this form. I understand that this evaluation does not necessarily mean that additional work will be performed on my heater. I also understand that any work completed will be done at no charge to myself or my family.

Signature of resident_____Date_____

2. Heating Working ( ) yes ( ) no

3. Major Problems

Oil leak ( ) yes ( ) no gas leak ( ) yes ( ) no

Heating Pipes or radiators cracked? ( ) yes ( ) no

Damaged flue/chimney duct/cold return ( ) yes ( )no

Boiler leak ( ) yes ( ) no

Hot air furnace heat exchanger cracked? ( )yes ( ) no

Soot in living area? ( ) yes ( ) no

Change in CO_2 or O_2 when blower comes on ( ) yes ( ) no

If so, record % of CO_2/O_2 with blower on _____and off_____

Rusted heat exchanger due to humidifier leak ( ) yes ( ) no

Low-water cut-off present ( ) yes ( )no Operable ( ) yes ( ) no

Auto-feed present ( ) yes ( ) no Operable ( ) yes ( ) no

4. Emergency Switch Working ( ) yes ( ) no

5. Settings on High Limit

5 pounds or less on steam ( ) yes ( ) no

210° or less on hot water ( ) yes ( ) no

250° or less on hot air ( ) yes ( ) no

6. Heating Plant Data

Manufacturer_____ Model #_____

Output_____ GPH_____

Oil burner mounting ( ) flange ( ) pedestal

Conversion: coal to oil ( ) yes ( ) no oil to gas ( ) yes ( ) no

Summer/winter hook-up ( ) yes ( ) no

Stainless steel chamber ( ) yes ( ) no

Condition of blower motor ( ) good ( ) poor

Condition of gas burners ( ) good ( ) poor

Oil filter ( ) yes ( ) no

Air filter ( ) yes ( ) no

Thermostat operable ( ) yes ( ) no

7. Efficiency Test Results

Oil	Gas
Room Temp. _____	Room Temp _____
Smoke reading _____	O2_____
CO_2_____ CO_____ppm	CO_____ppm
Draft in flue_____	
Net Stack Temp_____	
Efficiency Rating_____	

Smoke Discount

If smoke is	0	1	2	3	4	5	6	7	8	9
Then subtract	0	0	0	0	1	2	3	4	5	7

Adjusted efficiency Rating _____

8. Recommendation

Repair - ( ) yes ( ) no Reason? Be specific _____

_____

_____

Retrofit-tuneup ( ) yes ( ) no

If no, why, be specific.

_____

_____

_____

Replace unit ( ) yes ( ) no Reason? Be specific

_____

_____

_____

9. Additional Comments

_____

_____

_____

_____

_____

10. Surveyor's Name _____

If surveyor is a contractor list company name:

_____

_____

Surveyor's signature _____ Date _____

Agency heater specialist signature _____ Date _____

HEATING SYSTEM IMPROVEMENT PROGRAM CHECKLIST

1. Agency_____
2. Date Service Requested_____
3. Does client have heat?_____
4. Gas/Electric operable?_____
4A. Oil in tank?_____

5. Client Name_____Job #_____

a. How many eligible units share this common heater?_____

b. Fuel Type: oil_____ gas_____ kerosene_____

electric_____ other_____

c. Type of system: warm air_____ hot water_____

steam _____ other_____

d. Hot water tank_____ oil_____ gas_____ electric_____

6. Condition of Existing Unit

Note: Any defects listed in this section must be supported by the heater survey, including test results when the heater is operable. The agency heater specialist is responsible for verifying all defects reported by contractors.

_____

_____

_____

_____

Contractor_____ Evaluation Date_____

Agency heater specialist_____ Evaluation Date_____

7. Estimates

a. Contractor Names Total Cost Material Labor

1. _____
2. _____
3. _____
4. _____

b. Selected Contractor with lowest bid/estimate? yes_____ no_____

C. If selected contractor is not the one who submitted the lowest estimate, state reason for rejection.

_____

_____

_____

_____

Note: Failure to select the lowest estimate without adequate justification may result in delays in reimbursement or disallowed cost. If in doubt, consult your monitor.

8. Selected Heater - GAMA Certified pg #_____ Hydronics Inst. pg #_____

a. Manufacturer_____

b. Trade/Model Name_____ Model #_____

c. BTU input_____ heating capacity (BTU output) _____

d. AFUE_____ SSE_____

e. Disconnect & remove: _____oil heating unit, _____oil tank,

_____H_2O tank, _____yes _____no

If no, state the reason:

_____

_____

_____

9. Selected Hot Water Tank

GAMA certified pg #_____ Fuel Type_____

Manufacturer _____ Trade Name_____

Model #_____ Tank size_____

First HR rating gallons_____ energy factor_____

Note: replacement of H_2O tanks must be justified per weatherization Bulletin #721.

10. Additional parts: _____replacement _____repair

Note: Do not list parts that are included in the standard replacement heating system package in this section.

_____ gas piping _____ linear ft.

_____ water lines _____ linear ft.

_____ oil lines _____ linear ft.

_____ duct _____ linear ft.

_____ radiators _____ how many?

_____ baseboard _____ linear ft.

_____ oil tank _____size _____above ground _____in ground

_____ electrical Specify:_____

_____

_____

_____other specify_____

_____

_____

_____

11. Final Inspection Data

Date work was approved_____

Date work was completed_____

Date work was final inspected by the agency_____

State of New Jersey

DEPARTMENT OF COMMUNITY AFFAIRS

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WEATHERIZATION BULLETIN #726

September 28, 1998

To: Executive Directors and Weatherization Managers

From: Clarice S. Sabree-Sylla, Supervisor, OLIEC

Affected Programs: All

Reference: Consumer Product Safety Commission Release #94-004

Revision Scope: Provides additional product warnings for various models of heating systems manufactured and sold by York International between 1984 and 1988.

Summary: Provides information regarding free replacement by the manufacturer of various model heating systems that may allow carbon monoxide to leak into the living area.

YORK OFFERING TO REPLACE ALL HEATPIPE FURNACES

PRODUCT: Approximately 4,000 Borg-Warner, Luxaire, Fraser-Johnson, and Moncrief "Heatpipe" furnaces manufactured and sold by York International Corporation between 1984 and 1988.

PROBLEM: Parts of the furnace and vent system may fail prematurely. Failure of vent components could allow potentially hazardous carbon monoxide (CO) gas to leak into the home.

WHAT TO DO: Owners of affected furnaces should call York at 1-800-310-3476 to obtains a free replacement furnace. York is providing a $200 allowance toward the cost of installing the replacement furnace.

Washington, DC-- The U.S. Comsumer Product Safety Commission (CPSC) announced that York International Corporation of York, PA has voluntarily offered to replace all Borg-Warner, Luxaire, Fraser-Johnson, and Moncrief "HeatPipe" furnaces. York initiated this warranty enhancement program because certain parts of the furnace and vent system may fail prematurely. Failure of certain furnace and vent components could allow potentially hazardous carbon monoxide (CO) gas to leak into the home.

York manufactured approximately 10,000 HeatPipe furnaces between 1984 and 1988 under the brand names Borg-Warner, Luxaire, Fraser-Johnson, and Moncrief. These mid-efficiency furnaces can be identified by the following model numbers: Luxaire/Frasier/Johnson/Moncrief: (models PAUT-LD08N073, PAUT-LD12N073, PAUT-LD12N105), and PAUT-LD16N105; Borg-Warner/York (models PINUD08N06301, PINUD12N06301, PINUD12N08901, and PINUD16N08901). York estimates approximately 4,000 HeatPipe furnaces remain in use.

Under York's warranty program, HeatPipe furnace owners may obtain a free replacement furnace of similar capacity. Replacement of the HeatPipe furnaces will require professional installation and replacement of some or all of the furnaces' venting components. York will provide a $200 allowance toward the cost of installing the replacement furnace.

CPSC urges anyone with a HeatPipe furnace to participate in HeatPipe replacement program. Consumers can call York 1-800-310-3476 or contact an authorized York, Fraser-Johnson, or Luxaire dealer to obtain a new replacement furnace. York is sending a letter to all known HeatPipe owners explaining the warranty program.

CSS/bam/1922R

HEATING SYSTEM REPAIRS

Heating systems that have a three-year life expectancy or more should be repaired or retrofitted.

HEATING SYSTEM UPGRADES AND SHELL WEATHERIZATION

DOE funds can be used to complete shell work in a unit that receives a heating system upgrade with DHS funds. The cost must be reported separately and program averages must be maintained. The cost of shell work or heater work cannot be split and charged to both grants.

HOME ENERGY ASSISTANCE PROGRAM FUNDS FOR HEATING SYSTEM REPLACEMENTS

HEA funds may be used for heating system repairs with the following limitations:

1. It must be during the Home Energy Assistance Program emergency period.
2. The recipient must be a HEA recipient AND a homeowner.
3. The maximum amount allowable is $1,000 within a program year.

The $1,000 in HEA funds may be combined with DOE or DHS/WAP funds to retrofit, repair, or replace a heating system. HEA funds used for heating system repair or replacement cannot be reported on the DOE or DHS WAP report.

All sources of funds used must be documented in the client file and reported by funding source.

OIL-FIRED HEATING SYSTEM RETROFITS

The cost of an Oil-fired heating system retrofit may cost up to $1,500.

MINOR REPAIRS

Agency field technicians should be capable of making minor repairs i.e. cement around flue going into chimney.

HOT WATER HEATERS

Hot water heaters can be replaced with DOE or DHS funds. Shell work may be charged to DOE and the Hot water heater to DHS and vice versa.

LEVERAGING

Heating system and Hot water tank replacement in rental properties must have a landlord contribution of at least 50%. This does not apply to landlords that are income eligible.

WALK-AWAY POLICY

If the cost of a heating system replacement exceeds allowable cost and additional funds are not available thru Leveraging the replacement cannot be done. An agency cannot charge clients or endorse clients entering into a payment agreement with a contractor for the amount in excess of what the agency can pay.

State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

JAMES E. MCGREEVEY
Governor

SUSAN BASS LEVIN
Commissioner

WEATHERIZATION BULLETIN # 727

December 12, 2003

TO: Executive Directors and Weatherization Managers

FROM: Clarice Sabree-Sylla, Supervisor
Office of Low-Income Energy Conservation

Topic: Heating System Improvement Program

Affected Programs: All

Summary: As of October 1, 2003 no additional funding is available specifically for the treatment of heating systems. The purpose of this policy bulletin is to provide guidance to Weatherization and Home Energy Assistance Program subgrantees on how to do heating system upgrades with DOE and DHS funds.

EMERGENCY HEATING REPLACEMENTS

Agencies are reminded that DOE does not allow heating systems to be replaced based solely on an emergency. The energy audit must recommend replacement with a savings to investment ratio S.I.R. of 1 or greater, or it can be done as a health and safety measure if the cost is within the amount allowed for that purpose per the contract. If the total allowable is $20,000 for health safely, an agency can charge heaters that need replacement and are not recommended by the energy audit up to that amount. Heaters charged to DOE must be with in program averages i.e. maximum $2,900 – (may add HEA funds up to $1,000 when allowable). Heating systems can be repaired, retrofitted, or replaced as an emergency with DHS funds up to a maximum cost of $4,000.

Any heating system replacement to be completed with DHS funds that exceeds $3,500 must be approved by OLIEC. Heating system replacements that exceed $4,000 will not be approved. Replacement justification must be verifiable by visual inspection with photo or test results.

State of New Jersey
DEPARTMENT OF COMMUNITY AFFAIRS

CHRISTINE TODD WHITMAN
Governor

JANE M. KENNY
Commissioner

W E A T H E R I Z A T I O N B U L L E T I N # 727

To: Executive Directors & Weatherization Program Manager

From: Clarice Sabree-Sylla, Supervisor
Office of Low-Income Energy Conservation

Date: September 25, 2000

RE: HEATING SYSTEM IMPROVEMENT PROGRAM POLICY REVISIONS
AFFECTED PROGRAMS: HIP,DHS,DOE,AND HEA

Effective immediately subgrantees may use Heating System Improvement Program (HIP) funds to replace heating systems in units that also receive shell weatherization with DOE or DHS funds.

HIP funds may be used for emergency heating system replacements with prior approval from the OLIEC.

The per unit expenditure limit for heating system upgrades with HIP funds is 5,000.

Department of Energy
Washington, DC 20585

OLIEC BULLETIN # 728

WEATHERIZATION PROGRAM NOTICE 08-4
EFFECTIVE DATE: March 3, 2008

SUBJECT: SPACE HEATER POLICY

PURPOSE: To update the policy relating to space heaters for the Low-Income Weatherization Assistance Program (Weatherization). This policy supersedes the previous space heater policy issued by memoranda on March 18, 1992.

SCOPE: The provisions of this guidance apply to all grantees applying for financial assistance under the Department of Energy (DOE) Weatherization Assistance Program. This policy applies to electric and gas- and liquid-fueled space heaters only. Wood-burning stoves are addressed in separate guidance, which will be updated at a later date and will likely be expanded to include coal-burning stoves. This policy applies to electric and gas- and liquid-fueled space heaters whether the appliance is the primary or secondary heat source.

LEGAL AUTHORITY: Title IV, Energy Conservation and Production Act, as amended, authorizes the Department of Energy to administer the Low-Income Weatherization Assistance Program. All grant awards made under this program shall comply with applicable law including regulations contained in 10 CFR Part 440 (most recently issued June 22, 2006), and other procedures applicable to this regulation as DOE may from time to time prescribe for the administration of financial assistance.

INTRODUCTION: An estimated three million low-income households in the United States rely on space heaters as their primary method of heating their homes. An additional four million low-income households use space heaters as a secondary method of heating. Potential health and safety risks associated with the use of space heaters, especially portable and unvented devices include elevated levels of carbon monoxide, fire hazards, and excessive moisture resulting in mold and rot.

The previous space heater policy was issued March 18, 1992. Since then, Weatherization providers have improved their ability to reduce air infiltration in weatherized dwellings, which can exacerbate carbon monoxide and moisture hazards. Within the past ten years, local jurisdictions in at least 48 and 44 States have adopted the International Residential Code (IRC) and International Fuel Gas Code (IFGC), respectively, that include requirements related to space heaters. Most of these States have adopted the codes and enforce them statewide. The space heater policy issued by this Weatherization Program Notice (WPN 08-4) is consistent with the IRC and IFGC and clarifies how to best address eligible dwelling units containing space heaters.

INCIDENTAL REPAIRS: Incidental repairs under the Weatherization Program are not affected by the policy contained herein. Agencies may continue making incidental repairs necessary to allow weatherization work to proceed safely, including to space heaters.

SPACE HEATER POLICY: Separate guidance is provided for vented space heaters and unvented space heaters.

Vented Space Heaters: Vented gas- and liquid-fueled space heaters should be treated the same as furnaces in terms of repair and replacement, as well as combustion appliance safety testing. This policy applies to vented natural gas-fired space heaters, vented propane-fired space heaters, and oil-fired space heaters (which are always vented).

Unvented Space Heaters: Separate guidance applies to electric space heaters and unvented gas- and liquid-fueled space heaters.

Electric Space Heaters – DOE will not permit any DOE-funded weatherization work other than incidental repairs on electric space heaters. DOE will not preclude the use of other funding sources for the replacement or major repair of electric space heaters, but the Department does not encourage it because of:

- The high cost of electricity as compared to fossil fuels;
- Lower output ratings (size);
- Risk of fire hazards; and,
- Inadequate electrical systems in older homes frequently cannot safely carry the power required to operate an electric heater.

Work on such systems may make local agencies liable for inadequate electric wiring and damages that may result.

Unvented Gas- and Liquid-Fueled Space Heaters – DOE will not permit any DOE-funded weatherization work where the completed dwelling unit is heated with an unvented gas- and/or liquid-fueled space heater as the primary heat source. This policy applies to unvented natural gas-fired space heaters, unvented propane-fired space heaters, and unvented kerosene space heaters. This policy is consistent with the IRC and the IFGC.

DOE strongly encourages removal of all unvented gas- and liquid-fueled space heaters and replacement with vented, code-compliant heating systems as a prerequisite to weatherization. However, DOE will allow unvented gas- or liquid-fueled space heaters to remain as secondary heat sources in single-family houses provided they comply with the IRC and the IFGC. DOE is allowing this flexibility primarily to provide low-income clients an emergency back-up source of heat in the event of electrical power outages. Therefore, preference should be given to code-compliant units that do not require electricity.

Specifically, any unvented gas- and liquid-fueled space heaters that remain in a completed single-family house after weatherization:

- Shall not have an input rating in excess of 40,000 Btu/hour;
- Shall not be located in, or obtain combustion air from sleeping rooms, bathrooms, toilet rooms, or storage closets, unless:
  - Where approved by the authority having jurisdiction, one listed wall-mounted space heater in a bathroom:
    - Has an input rating that does not exceed 6,000 Btu/hour;
    - Is equipped with an oxygen-depletion sensing safety shut-off system; and
    - The bathroom meets required volume criteria to provide adequate combustion air;
  - Where approved by the authority having jurisdiction, one listed wall-mounted space heater in a bedroom:
    - Has an input rating that does not exceed 10,000 Btu/hour;
    - Is equipped with an oxygen-depletion sensing safety shut-off system; and
    - The bedroom meets required volume criteria to provide adequate combustion air.
- Shall require the enforcement of minimum ventilation guidelines as determined by the greater of:
  - 15 cubic feet per minute (CFM) per person,
  - 15 CFM per bedroom plus one [(# of bedrooms + 1) x 15 CFM], or
  - .35 air changes per hour.

  The above minimum ventilation guidelines are natural ventilation rates, not with the house depressurized to -50 Pascal with a blower door.

  Alternately, the minimum ventilation guidelines in the American Society of Heating, Refrigeration, and Air-Conditioning Engineers (ASHRAE) Standard 62.2, Ventilation and Acceptable Indoor Air Quality in Low-Rise Residential Buildings, may be used if the State desires.

DOE funds may only be used to replace the primary heating source. DOE funds may not be used to replace unvented space heaters to be left in the weatherized dwelling unit as secondary heating sources. For example, a home has several older gas- or liquid-fueled, unvented space heaters that do not comply with the International Residential Code because they do not have oxygen-depletion sensing safety shut-off systems. The Weatherization Program can replace the primary unvented space heater with a vented unit, but cannot expend DOE funds to replace one of the existing secondary space heaters with a code-compliant unvented unit with an oxygen-depletion sensing safety shut-off system. DOE will not preclude the use of other funding sources to replace secondary space heaters with code-compliant units.

The Manufactured Home Construction and Safety Standards require all fuel-burning, heat-producing appliances in mobile homes, except ranges and ovens, to be vented to outside. Further, all fuel-burning appliances in mobile homes, except ranges, ovens, illuminating appliances, clothes dryers, solid fuel-burning fireplaces and solid fuel-burning fireplace stoves, must be installed to provide for the complete separation of the combustion system from the interior atmosphere of the manufactured home (i.e., to draw their combustion air from outside).

Cost Effectiveness: Current regulations governing weatherization activities require that measures installed in a dwelling unit be selected on the basis of cost effectiveness, with the most cost effective installed first. Unvented space heaters have very high efficiency ratings because they discharge their exhaust gases directly into the space being heated rather than outside, allowing the energy embodied in the hot exhaust gases to be released into the heated space. Vented space heaters exhaust combustion products and considerable amounts of energy out of the residence, and, therefore, are far less energy efficient.

The replacement of an unvented space heater with a vented one may not be cost-justified through energy savings. However, DOE strongly encourages States to combine other weatherization measures and health and safety considerations with vented space heaters as replacements for unvented space heaters. In such instances, the heat energy demanded by the structure can be lowered by energy-saving, cost-effective weatherization measures so that total energy costs are less or the same, while the indoor air quality is greatly improved through the use of a vented space heater paid for with health and safety funds.

Smoke and Carbon Monoxide Detectors: Any space heater replacement or repair procedure should include inspection to ensure that working smoke and carbon monoxide detectors are installed on the same floor as the space heater. In instances where smoke and carbon monoxide detectors are not present or are not operating properly, new detectors may be purchased and installed with DOE funds. The purchase and installation cost of the smoke and carbon monoxide detectors may be charged to the health and safety category or to program operations at the State's discretion.

Client Education: Client education, including information on the proper operation of the heating equipment and installed smoke or carbon monoxide detectors, should be provided. Of critical importance is strong client education regarding the dangers of carbon monoxide and excessive moisture levels, particularly if any unvented space heaters are left in the dwelling as a secondary heat source, or emergency back-up.

Other Heath and Safety Consideration: Electrical wiring and chimneys should be checked to ensure they are in good condition and that no obvious building code violations are evident. Masonry chimneys used by vented space heaters should be properly lined in compliance with the IFGC. Safety inspection related to the space heater should include, but not be limited to, a check for adequate floor protection and code-compliant clearances to walls and other combustible materials. Even though many vented space heaters are manufactured with spill switches, it is still a requirement that a worst-case depressurization draft test be performed on all vented units.

Compliance with Local Code, Permitting, and Inspection Requirements: Installation of space heaters requires knowledge of appropriate industry standards and adherence to all aspects of the applicable building code(s) in the municipality where installation is taking place. Building permits should be secured, where required, (this is a program operations cost) for all space heater work and final inspection by competent professionals should take place before any heater is put into operation. States are reminded that even

licensed heating contractors may not be aware of the stringent requirements of the Weatherization Program, so their work should be reviewed by Program staff.

IMPLEMENTATION: Grantee health and safety policy, especially as it relates to space heater repair and replacement, in compliance with the above guidance, must be explained in the applicable State plan or appropriate amendment in order to permit Project Management Center review and approval. Funds to address these items as part of weatherization work will be allowable costs. It is especially important to insure that adequate inspection, safety, liability, and insurance procedures exist and are followed. In all cases, an education component for clients should be a part of the space heater work. Further, testing for indoor air quality, especially carbon monoxide levels in homes with unvented space heaters, should be performed. The cost to purchase the testing device and mechanical tools necessary to check for indoor air quality and to train personnel to do the testing are allowable program expenses. These charges may be made to the program operations cost category.

RELATED MATERIALS AND DOCUMENTS:

The following pamphlets and fact sheets may be useful for educating clients and training staff.

CONSUMER PRODUCT SAFETY COMMISSION PAMPHLETS (CPSC, http://www.cpsc.gov/cpscpub/pubs/pub_idx.html):

Smoke Detectors Can Save Your Life (English and Spanish versions)
Carbon Monoxide Detectors Can Save Lives
Carbon Monoxide Questions and Answers (English and Spanish versions)
The Invisible Killer (CO) (English)
The Senseless Killer (CO) (Spanish)
What You Should Know About Space Heaters
Product Safety Fact Sheet - No. 98: Electric Space Heaters
Product Safety Fact Sheet - No. 97: Kerosene Space HeatersProduct Safety Fact Sheet - No. 99: Ground-Fault Circuit Interrupter (GFCI)
Product Safety Fact Sheet - No. 566: Home Fire Safety Checklist (English and Spanish versions)

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Ronald Shaw
Acting Program Manager
Office of Weatherization and Intergovernmental Program
Energy Efficiency and Renewable Energy

State of New Jersey

Department of Community Affairs

Division of Housing and Community Resources

Weatherization Policy Bulletin Permits #729

TO: Executive Directors and Weatherization Managers

FROM: Clarice Sabree, Supervisor
Office of Low-Income Energy Conservation

DATE: November 17, 2009

RE: **Heating System Permits and Permit Applications**

Summary:

Contractors must apply for permits before installing any heating system upgrade hot water tanks and chimney liners that require an inspection by local code officials.

The permit is to be applied for after getting the authorization to proceed from the weatherization agency and before work commences.

Policy:

Contractors must apply for a permit before starting a heating system upgrade, unless the installation is an emergency that occurs outside of business hours in which case, the contractor will apply for the permit the next business day after the emergency occurs.

The contractor will submit either a copy of the permit, or if the permit has not been provided to the ntractor at the conclusion of the work, a copy of the application must be provided.

Page 2 Continued:

The application will not be deemed acceptable unless all the following information is included:

1. The control number and permit number
2. The application date and the permit fee
3. The name of the contractor and homeowner
4. Work to be covered by the permit and location of the work
5. Total cost of the work

If the application does not include the information listed above, the agency may not accept the application, and the contractor may not be paid until the actual permit is received.

Agencies are expected to work with the local code officials to ensure that inspections are completed in a timely fashion and to determine if delays in producing the required permits are backlogs at the local government level or due to late application filing on the part of the installing contractor.

Agency final approval of a heating system installation does not relieve the installing contractor of the requirement to make any corrections or repairs that may be required as a result of local code inspections.

CS/dw

Weatherization Policy Bulletin # 730

TO: Executive Directors and Weatherization Managers

FROM: Clarice Sabree, Supervisor
Office of Low-Income Energy Conservation

DATE: 2/1/2010

RE: **Heating System Replacements, Hot Water Heaters**

Effective immediately all heating systems replacements and hot water tank replacements must be documented by a pre-replacement picture.

This policy is being implemented to ensure that heating system improvement funds are being expended appropriately.

The client file must have a picture showing tile and existing heater and hot water tank prior to replacement, and another picture showing tile new installation.

Agencies are reminded that any heating system upgrades with costs exceeding $6,500 must be approved by this office before authorization.

CSS/dw